Training Committee
Meeting Summary
February 17, 2023

1. Roll Call:

   Ilona Taunton, Program Administrator, called the meeting to order at 11am Eastern on February 17, 2023 by teleconference. The meeting was hosted by Elizabeth Turner. The meeting was attended by 6 Voting Committee members and 6 Associate Members (see Attachment A).

   There were not enough voting members on the call to do business, but the Committee did meet to review information.

   There were no changes to the agenda.

3. Competency Task Force

   William is working on building the database for the Credentialing program. Jerry would like to plan a public webinar in March to seek feedback. He is also working on business plan for the TNI Board. They need to resolve fees.

   It will likely be implemented through 3 phases:
   Phase 1 - Digital Badges
   Phase 2 - Competency Exam
   Phase 3 - Credentialing

   The summary document about the program distributed in San Antonio and shared with this Committee is self-explanatory.

   Marlene asked a while ago about whether Jerry still needs input from Trainers about using some of their classes. This is no longer needed because individuals will be deciding which course to take.

   It was asked how testing will be done. There will be a test with each badge instead of needing to develop tests for all the training classes that don't have them.

   Mark and Marlene will start work on an SOP on how to develop tests. Jerry will send Mark and Marlene a copy of the PowerPoint presentation given in San Antonio to help with this.

4. Training Opportunities Workgroup

Ilona reported for this Workgroup. They will be meeting after this meeting to finalize the course list and basic descriptions of the courses we would like to have Trainers bid on. There should be 4 classes included. The RFP will go out before mid-March. *(Addition: See Attachment B for final RFP Topics.)*

The Basic Assessor class in March is already sold out. Ilona will talk to Marlene and Paul Junio to see if registration can open earlier for the next planned classes.

5. Catalog Template

Work needs to be done on SOP 1-128 to incorporate the elements needed to post a class. This will build consistency. Ilona and Jerry will work on bringing the older classes up to date to when the SOP is finalized.

Jerry will put a list together of the classes involved in the first credentialing effort. This is where Ilona and Jerry will start on class description updates.

6. Training Review Workgroup

Progress is being made. The first batch of additions to the website to provide updates where needed has been sent to William to post.

7. Social Media

Jerry Thao noted that there are 300 followers on LinkedIn. The number is increasing.

Ilona will send a copy of the RFP to Jerry to post when the email blast goes out.

8. Trainer Evaluations

There are two parts:
First - how do you evaluate a new trainer?
Second - how was the training class?

There is a survey in place for the second part, so the Committee will focus on the first part.

Currently, during the proposal phase the application requests qualifications from trainers and TNI's Training Coordinator works closely with new trainers.

Ideas to work on:
- Formalized checklist of things to review with new trainers?
- SOP for the process of working with new trainers?
- Consistent evaluation?

There are a number of items the Committee is working on, so this will likely be tabled until Fall 2023.

9. Action Items

    See Attachment C.

10. New Business

    None.

11. Next Meeting and Close

    The next teleconference meeting will be on March 10, 2023 at 1pm Eastern.

    Ilona and Elizabeth adjourned the meeting at 1:53pm Eastern.

Attachment A

Participants
TNI Training Committee

Voting Members	Represent	Affiliation	Contact Information
Calista Daigle Chair **Absent**	Lab	Pace Analytical Services, LLC.	Calista.Daigle@Pacelabs.com
Mark Alessandroni **Present**	Other	Markay Consulting Group	mark@markaycg.com
Aaren Alger **Absent**	Other	Alger Consulting & Technology	aaren@alger-consulting.com
Jack Farrell **Present**	Other	Analytical Excellence, Inc.	aex@ix.netcom.com
David Fricker **Present**	AB	A2LA	dfricker@a2la.org
Salima Haniff **Absent**	Lab	Bureau Veritas Laboratories	Salima.Haniff@bvlabs.com
Veronika Kerdok **Absent**	Lab	New York City DEP	VeronikaZ@dep.nyc.gov kerdokv@gmail.com
Joe Manzella **Present**	Lab	Orange County Sanitation District	JManzella@OCSD.COM
Mitzi Miller **Absent**	Other		mitzmi@comcast.net
Tami Minigh **Absent**	Lab	City of Daytona Beach	MinighTami@CODB.US
Dee Shepperd **Present**	Other	ddms, Inc.	ddbergere@gmail.com
Jerry Thao **Present**	Lab	Pace Analytical Services, LLC.	Jerry.Thao@pacelabs.com
Jerry Parr (ex-officio) **Present**	Executive Director / Ex Officio	TNI	jerry.parr@nelac-institute.org
Ilona Taunton **Present**	Program Administrator	TNI	ilona.taunton@nelac-institute.org
Associate Members:	**Present**		
Robin Cook		City of Daytona Beach	cookr@codb.us
Alan Ching	X	Weck Laboratories, Inc.	alan.ching@wecklabs.com

Voting Members	Represent	Affiliation	Contact Information
Wanda Harney	X	City of Cincinnati – Metropolitan Sewer District (MSD)	Wanda.Harney@cincinnati-oh.gov
Mike Michaud		City of Abilene, Water Utilities	mike.michaud@abilenetx.gov
Chrystal Sheaff		Energy Laboratories	csheaff@energylab.com
Ashley Larssen		City of Derby, KS	ashley.larssen@kcmo.org
Cindy Story		Gulf Coast Authority	cstory@gcatx.org
Marlene Moore	X		
Elizabeth Turner	X	Pace Analytical Services	elizabeth.turner@pacelabs.com
Melanie Ross	X	ANAB	mross@anab.org
Jennifer Best		EPA	
David Feist		ANAB	
Michella Karapondo	X	EPA	
Jessica Jensen		City of Derby, KS	

Attachment B – RFP Topics

1. Title	**Managing the Accreditation Process: Laboratories**
1. Description	Applying for accreditation, and maintaining that accreditation status, is one of the most important and complex tasks that a laboratory manager or quality manager will regularly perform. This course will provide a roadmap for managers to navigate the accreditation process and will provide vital information related to obtaining an initial accreditation. For labs who are already accredited, this course will provide valuable knowledge for ensuring a smooth accreditation renewal process, reducing the chances that the laboratory will face a disruption to their accreditation status. The course will also cover information related to making changes to an existing accreditation certificate. Learning Objectives: • Knows the minimum requirements for NELAP accreditation. • Knows how to submit an application for accreditation and who it should go to. • Knows the required documents to accompany the application. • Knows which Fields of Accreditation (FOA) to request to ensure they match the AB's offerings • Knows how to conduct a pre-assessment meeting, if needed • Knows how to evaluate prior deficiencies, PT results, and corrective actions to be prepared. • Knows how to manage the assessment including interview and records review. • Knows how to respond to preliminary findings. • Understands the next steps in the process. • Knows how to professionally interact with the assessor. • Knows how to address the nonconformances, including root cause analyses. • Knows how to write a Corrective Action Plan • Knows how to implement the promised corrective actions. • Knows how to add/remove FOAs on an existing accreditation certificate. Pre-requisite Course(s): None Recommended Participants: Lab managers, quality managers. Suggested length: 8 hours? Depends on how detailed each section is. Could easily be a multi-day course. Maybe one day for accreditation

	requirements/paperwork/FOAs/accreditation renewal, and a second day for assessment process/findings/CAPAs/audit response.
2. Title	**Customer Service – It is More than Reporting Results**
2. Description	Great customer service representatives know that customer services is much more than filling orders. They know to seek to understand not just the What but also the Why for the analyses being requested. They know if their laboratory has the capability/resources to meet the customer's requirements, and if not, how to direct the customer to another laboratory or help them through subcontracting. They know how to review laboratory results not just for compliance with the laboratory's policies and procedures, but how to review them relative to the customer's needs. They know how to inform the customer of any issues affecting the quality of the data including the use of data qualifiers, case narratives, and related communication. Learning Objectives: • Knows the "customer" may be someone within the organization such as a plant supervisor. Ensures the requirements, including the methods to be used, are adequately understood and that the appropriate test method is selected and is capable of meeting the customers' requirements. • Understands the importance of using a competent subcontractor. Knows to seek feedback, both positive and negative, from its customers. Understands the actions needed to resolve complaints received from customers or other parties. • Understands how to build a good relationship with customers and laboratory staff. • Understands the laboratory's responsibility to review the request to ensure it can be met and how this review is to be documented. The discussion will include the components required to accomplish a successful review and the generation and maintenance of the documentation of any requested new work, tender and contract. • Understands what constitutes new work in the commercial, captive, and public laboratory and what is considered routine work. Knows how to provide feedback to the client. • Understand the procedures for the resolution of complaints received from customers. • Understand the laboratory's policies and procedures that are done when any aspect of its testing does not conform to its own procedures or the agreed requirements of the customer.

	- Understands how to assess and evaluate on QC results including corrective actions as needed. - Understands how to advise a customer to choose appropriate methods related to their regulatory requirements. . - Understands basic statistical concepts and techniques used for the collection, organization, analysis, and presentation of various types of laboratory data, including methods for calculation of QC results - Ensures test reports contain the following:
	   a) deviations from, additions to, or exclusions from the test method, and information on specific test conditions, such as environmental conditions;
	   b) where relevant, a statement of compliance/non-compliance with requirements and/or specifications;
	   c) where applicable, a statement on the estimated uncertainty of measurement; information on uncertainty is needed in test reports when it is relevant to the validity or application of the test results, when a customer's instruction so requires, or when the uncertainty affects compliance to a specification limit;
	   d) where appropriate and needed, opinions and interpretations (see 5.10.5);
	   e) additional information which may be required by specific methods, customers or groups of customers. - Understands the process for amending a test report after issue. - Knows how to report results to clients. Knows how to review data and test results and how to determine if data is appropriate for intended use. Understands data qualifiers and their applicability. Knows how to record and retain technical records. Knows how to review quality control results and take appropriate actions.
	Pre-requisite Course(s):
	Recommended: Choosing the Right Analytical Protocol
	Recommended: **Brown Bag 11- Contracts and Tenders & Service to Client Requirements and Implementation Ideas**
	
	Recommended Participants: Customer Service Personnel, Lab Manager, Quality Manager, Technical Manager
	
	Suggested length: Could be a series of classes.

3. Title:	**Policies and Procedures Needed for a NELAP Laboratory**
3. Description	The TNI standard uses these words somewhat interchangeably: policy, procedure, system, SOP, plan, program, system, and protocol. The objectives are to review all the instances of these words and discuss various options for compliance.

(Topics to be considered/included when developing this class. This is a list of Standard references for these terms:

4.2.1 The laboratory shall establish, implement, and maintain a management system appropriate to the scope of its activities. The laboratory shall document its policies, systems, programs, procedures, and instructions to the extent necessary to assure the quality of test results. The system's documentation shall be communicated to, understood by, available to, and implemented by the appropriate personnel. The quality policy statement shall be issued under the authority of top management and shall include at least the following:

> *a) Lab Management's commitment good professional practice and to the quality of its testing and calibration in servicing its customers*
> *b) Management's statement of the lab's standard of service*
> *c) Purpose of the management system related to quality*
> *d) Requirement that all personnel concerned with testing activities within the lab familiarize themselves with the quality documentation and implement the policies and procedures in their work*
> *e) Lab management's commitment to comply with the standard and to continually improve the effectiveness of the management system*

4.1.5.c Policies and procedures to ensure protection of customers' confidential information and proprietary rights, including procedures for protecting electronic storage and transmission of results

4.1.5.d Policies and procedures to avoid involvement in activities that would diminish confidence in the laboratory's competence, impartiality, judgment, or operational integrity

4.1.5.e Relationship between management, technical operations, support services, and quality system

4.2.8.1 Procedures for establishing and maintaining data integrity, including training, documentation, and monitoring

4.2.8.5 SOPs that accurately reflect all phases of current lab activities, such as assessing data integrity, corrective actions, handling customer complaints, and all methods

4.6.1 Procedures for selection and purchasing of services and supplies; procedures for purchase, reception, and storage of reagents and consumables

4.13.1.1 Procedures for identification, collection, indexing, access, filing, storage, maintenance, and disposal of quality and technical records

4.13.1.4 Procedures to protect and back-up records stored electronically and to prevent unauthorized access to or amendment of these records

4.13.3.h Plan to ensure that records are maintained or transferred according to clients' instructions in the event the laboratory transfers ownership or goes out of business

4.14.1.5 Procedures addressing internal audits, findings, and corrective actions that ensure these actions are completed within the agreed time frame

	4.15.1 Procedures for conducting a review of the laboratory's management system and testing and/or calibration activities by laboratory's top management *5.4.7.2.b Procedures for protecting the data, including integrity and confidentiality of data entry or collection, data storage, data transmission, and data processing* *5.5.6 Program for safe handling, transport, storage, use, and planned maintenance of measurement equipment Mandatory Quality Elements & TNI Reference Laboratory Reference Document Compliant Comments & Corrective Actions Y N N/A* *5.5.11 Procedures to ensure where calibration gives rise to a set of correction factors that copies (e.g. in computer software, for thermometers) are correctly updated* *5.6.3.1 Program and procedure for the calibration of the laboratory's reference standards* *5.6.3.4 Procedures for safe handling, transport, storage, and use of reference standards and reference materials* *5.6.4 Procedures for purchasing, receiving, and storing materials used in technical operations of the laboratory* *5.7.1, 5.7.3 Sampling plan & procedures, if applicable, availability of plan at the sampling location Procedures for recording relevant data and operations relating to sampling* *5.7.1 Procedures and appropriate techniques for obtaining representative subsamples as part of the test method* *5.8.1 Procedures for the transportation, receipt, handling, protection, storage, retention and/or disposal of samples* *5.8.4 Procedures to avoid deterioration, contamination, or damage to samples during storage, handling, preparation, and testing* *5.8.5.a System for uniquely identifying samples to be tested, including samples, sub-samples, preservations, sample containers, tests, and subsequent extracts and/or digestates 5.8.6.a-e Written sample acceptance policy* *5.8.6.f-g Procedures followed when samples who signs of damage, contamination or inadequate preservation; and qualification of data* *5.8.9.c Procedures for disposal of samples, digestates, leachates, extracts, and other sample prep products* *5.9.1 Quality control procedures for monitoring the validity of environmental tests and calibrations undertaken* *5.9.3.a Written protocols to monitor quality controls* *5.9.3.c Procedures for development of quality control acceptance/rejection criteria.)* Learning Objectives: • Knows the laboratory's policies, systems, procedures, and instructions to the extent necessary to assure the quality of the test results, including SOPs that accurately reflect all phases of current laboratory activities,

	such as assessing data integrity, corrective actions, handling customer complaints, and all test methods.
	• Understands the importance and is familiar with the types of documents that form part of the management system, such as regulations, standards, and test methods, as well as drawings, software, specifications, instructions, and manuals. Ensures that authorized editions of appropriate documents are used and that invalid or obsolete documents are promptly removed to ensure unintended use.
	• Understands how and when policies and procedures are revised.
	• Knows how to develop and manage policies and procedures so as to add value. Understands the process for reviewing and controlling SOPs. Knows how to effectively write and review documents so they reflect the requirements and actual lab practice and are written for bench level use. Knows how to assure that analysts are following the currently approved versions.
	Pre-requisite Course(s): **Required: Technical Writing for Environmental Method SOPs**
	Recommended Participants: Lab managers, quality managers, technical manager
	Suggested length: 2-3 hours
4. Title	**Managing a Data Integrity Investigation**
4. Description	Based on a potential concern brought by a client, a whistleblower, or discovered in an internal audit, you suspect some improper practice by an analyst or group of analysts could have resulted in a data integrity issue. What do you do? This course will cover initial investigation, notification, corrective action and Final Corrective Action and root cause analysis.

Learning Objectives:
• Knows how to conduct an initial investigation including:
  - Review of raw data for investigation
  - If confirmed, getting HR involved immediately
  - Interviewing analyst(s)
  - Taking disciplinary action
  - Determining extent of problem if possible
• Knows how to perform notifications
• Knows how to work through initial corrective actions
  - Reprocessing data
  - Reissuing reports
  - Conducting data integrity refresher training for staff
• Knows how to perform Root Cause Analysis and determine final corrective actions |

	• Knows how to implement corrective action and any needed changes to the management system and data integrity program. Pre-requisite Course(s): None Recommended Participants: Lab Managers, Quality Managers, Human Resources, Corporate Management Suggested Length: 2-4 hours depending on detail.

Attachment C: Training Committee Action Item Summary

	Task Description	Document Number	TNI Contact	Committee Contact	Start Date	Complete Date	Communication	Notes
1	Complete Charter			Calista	5/12/20	10/23/20		7/10: Sent to Policy Committee Policy Committee sent recommended changes for review in September. 9/18: Agreed with updates. Calista will correct tenses by October meeting. 10/23: Charter was approved by Committee and will be sent to the Policy Committee.
2	Gather previous training course statistics.		Jerry	Jerry	7/10/20	9/18/20		Document reviewed with committee. Available when Workgroup begins looking at additional courses.
3	Reach out to TNI states and ask about training weaknesses.			Mitzi	7/10/20	10/23/20		9/18: Initial information reviewed. Will continue to discuss at next meeting when Mitzi there.
4	Check on IT possibilities for Training.		William - IT	Ilona	7/10/20	8/16/21		9/18: Still waiting on response about options on catalog. 2/12: Ilona will continue to work on this. 4/6/21 – Checked to see what William needs to get started. 8/16/21: William responded. Catalog is possible.
5	Develop Marketing Plan			TBD	3/12/21			The Sept and Oct 2020 meetings both discussed the need to evaluate marketing because a number of ABs are

	Task Description	Document Number	TNI Contact	Committee Contact	Start Date	Complete Date	Communication	Notes
								not aware of the classes available. 11/13/20: Committee decided not to form this Workgroup at this time. 3/12/21 – Committee started talking about marketing. 5/21/21: Work on social media presence.
6	~~Develop talking points on TNI training program and send that to the NELAP ABs~~		~~Jerry~~	~~Jerry~~	~~2/12/21~~			~~1/15/21: Combined with #9.~~ ~~2/12/21: Jerry is working on a tri-fold brochure.~~ Combine with #9.
7	When webcast is complete, send William instructions to post Website training Jerry just did in multiple places on TNI website.		Ilona	Ilona		1/15/21		Complete. Link became available.
8	Potential for subscription pricing training courses for ABs. Maybe just the TNI owned courses?		Jerry	Jerry	TBD	2/12/21		Not viable option due to lack of interest and complexity.
9	Prepare TNI handout for assessment opening meetings or to send prior to the assessment. It can include a		Jerry	Jerry	2/12/21			11/20/20: DRAFT to be discussed at next meeting. 1/15/21: Jerry is working on this. 2/12/21: Jerry is working on tri-fold brochure.

	Task Description	Document Number	TNI Contact	Committee Contact	Start Date	Complete Date	Communication	Notes
	brief segment where the assessors show the lab where to find information related to training courses offered, SIRs, PT tables and other information on the TNI website that new labs may not know how to access.							3/12/21: Combine with #6 – are talking points for ABs needed?
10	Credentialing Workgroup		Jerry		10/23/20	10/8/21		1/15/21: Recommended adding Competency Task Force members. Planning 1st meeting. 4/9/21: Group is developed and ready to start meeting. 5/21/21: Group has started meeting. Removed "Develop Digital Badges /" from action item. 10/8/21: Workgroup disbanded and work will be incorporated into Committee meetings.
11	Develop Training Materials Workgroup		Ilona		10/23/20			1/15/21: Workgroup started work by email. 2/12/21: First meeting was 2/11/21. 3/12/21: Group has started work.
12	Develop Training Opportunities Workgroup		Ilona		10/23/20			1/15/21: Workgroup started work by email. 2/12/21: First meeting was 2/12/21.

	Task Description	Document Number	TNI Contact	Committee Contact	Start Date	Complete Date	Communication	Notes
								3/12/21: Group has DRAFT courses for RFP. 4/9/21 – RFP complete. Need to develop process to develop training classes. 5/21/21: need to look for training gaps. 7/9/21: Develop monthly flyer format to summarize upcoming classes. 10th of month?
13	Prepare webcast to help with Training Application process.		Ilona		4/1/21			PowerPoint completed. Need to record and post.
14	Reach out to vendors for possible training opportunities.		Jerry		3/12/21 HOLD			Discussed: 3/12/21 Placed on Hold – 5/21/21
15	Make update to training email sent 4/22/20 and send out this April.		Jerry		3/12/21	7/9/21		Discussed: 3/12/21 4/9/21: Send out flyer with new courses instead. 7/9/21: Flyer went out and new classes are available.
16	Develop FAQ for potential Trainers.		Jerry		4/9/21			Jerry and Ilona worked on this and Jerry has sent to William for posting.
17	Look into meeting with NELAP AC to discuss training opportunities.		Jerry					4/9/21: Discussed.
18	Increase Social Media presence.			Jerry Thao	6/11/21	2/11/22		6/11/21: Look into LinkedIn – Group Page or Organization Page? 7/9/21: Ilona look at adding slide to trainings. Jerry looking

	Task Description	Document Number	TNI Contact	Committee Contact	Start Date	Complete Date	Communication	Notes
								at adding questions to TNI membership application. 11/19/21: Send proposal to Board for review. 2/11/22: Linked In set-up. Jerry Thao hired as consultant to keep up with this site and work with committee chairs on content.
19	Develop Monthly Flyer for Training Classes		Ilona		8/27/21	9/24/21		9/24/21: Now ongoing. Comes out week after Board Meeting with new classes.
20	Update EDS site to eliminate GLP category once SOP 1-110 complete.		Ilona/Jerry		TBD			
21	Develop Training Catalog			Elizabeth Turner	TBD			4-8-22: Elizabeth to lead this effort. 6-24-22: Shared template. Need to work with Training Opportunities Workgroup to make course descriptions more consistent. 2/17/23: SOP 1-128 will need to be finalized.
22	Prepare SOP for developing tests.		Ilona/Jerry	Marlene Mark	TBD			Added 10/14/22. 2/17/23: Marlene and Mark will start work on this to present at March meeting.
23	Develop quizzes and learning objectives for past courses.		Ilona		TBD	Cancel		Added 10/14/22 11/22/22: No longer needed. Badges will have exam instead.

	Task Description	Document Number	TNI Contact	Committee Contact	Start Date	Complete Date	Communication	Notes
24	Help develop SOP 1-128 (Content of TNI Training Courses)	SOP 1-128		Calista Ilona Elizabeth	TBD			Added 11/22/22.
25	Trainer Evaluation – Charter				TBD			3/17/23: Started discussion. Will start work on this topic in Fall 2023.